

# INSTRUCTIONS FOR COMPLETING AE DATA FORMS FOR SUBMISSION TO CITY OF COLONIAL HEIGHTS VA IN RESPONSE TO REQUEST FOR PROPOSALS

## **GENERAL INSTRUCTIONS**

DO NOT attempt to fill in these forms "on-line". First download and save a copy to your computer, then fill in the saved copy.

Read the Specific Instructions below to assist you in completing the various AE Data forms.

Click on the sheet tabs below to go to the appropriate form.

(If you need more than one copy of a specific type of form, make a copy of this Excel file.)

Fill in the fields highlighted in yellow. You can use the tab key to move easily from field-to-field. You can also use the mouse to select the field you wish fill. (On large text fields, you must use the mouse to select them, rather than the tab key.)

Some fields contain selection lists. These fields are denoted with an arrow just to the right of the field. To select from the list of choices, click on the arrow and then select the appropriate choice.

When complete, print the appropriate forms, assemble them in order, and submit them to the address noted in the RFP.

Be factual and concise.

**Deviation from the prescribed format is NOT encouraged as it makes it more difficult to review submittals. Form AE-6 allows you to include other supplemental data which is not covered on Forms AE-1 through AE-5.**

## **SPECIFIC INSTRUCTIONS**

### **Form AE-1 & 1A SYNOPSIS OF RESPONDING FIRM**

Insert RFP # to which response is being made.

Insert name of Responding Firm.

Insert name of Project and Project Code (PC #).

- 1 Show name, physical address and mailing address of respondent.  
Provide telephone number and FAX # of respondent.  
Provide SSN, if Sole Proprietorship, or Federal Employer Identification Number (FEIN) for other forms of ownership.
- 2a,b Provide information requested.
- 3 Provide name & address of Parent Company or Home Office  
Provide its telephone number and FAX #
- 4 Show Type of Ownership of firm and any disadvantaged firm statuses which also apply.  
Provide the firm's APELSCIDLA license number. ( APELSCIDLA = Commonwealth of Virginia's Board for Architects, Professional Engineers, Land Surveyors, Certified Interior Designers and Landscape Architects. Refer to the Department of Professional and Occupational Regulation for additional information.)  
If applicable, provide the firm's DSBSD Certification #. ( DSBSD = Commonwealth of Virginia's Department of Small Business and Supplier Diversity. )
- 5 Show name of principal(s) to contact concerning this RFP response. Show position title and telephone number.
- 6 Show the name of consultant(s) or other office, the nature of the consultant or other office's project responsibility/discipline. Answer with a yes or no if proposed consultant has worked with respondent.
- 7 Indicate number on "In-House" technical person(s) in various disciplines and skills levels. (Attach Form AE-2 for each consultant or other office.)
- 8 Show the name of the Professional Liability Insurance Carrier and the policy Limits of Liability with deductible.
- 9 Describe proposed involvement of Micro and Small businesses.
- 10 (a) List State Agencies for whom the firm has worked in last 5 years.  
(b) Provide names of firm's personnel who have attended a BCOM "CPSM Seminar" on the requirements of the Commonwealth of Virginia Construction and Professional Services Manual and their latest year of attendance.
- 11 List 3 to 5 recently designed projects that have similar scopes or features. Provide Representative Project Data

Form AE-5 for each.

General: Provide respondents typed name, title, signature and date.

## **Form AE-2 CONSULTANT / OTHER OFFICE**

**Complete an AE-2 form for each consultant firm who will assist the responding (i.e., prime) firm on this project.**

**If other offices of the responding firm will be employed on this project, complete an AE-2 form for each such office.**

General:

Insert RFP # being responded to  
Insert name of Entity responding  
Insert name of Project and PC #

- 1 Show consultant/other office firm name, physical address and mailing address.  
Provide telephone number and FAX # of respondent.  
Provide SSN, if Sole Proprietorsip, or Federal Employer Identification Number (FEIN) for other forms of ownership.

2a,b Provide information requested.

- 3 Provide name & Address of Parent Company or Home Office of Consultant  
Provide its telephone number and FAX #.
- 4 Show Type of Ownership of firm and any disadvantaged firm statuses which also apply.  
Provide the firm's APELSCIDLA license number. ( APELSCIDLA = Commonwealth of Virginia's Board for Architects, Professional Engineers, Land Surveyors, Certified Interior Designers and Landscape Architects. Refer to the Department of Professional and Occupational Regulation for additional information.)  
If applicable, provide the firm's DSBSD Certification #. ( DSBSD = Commonwealth of Virginia's Department of Small Business and Supplier Diversity. )
- 5 Show name, title, and phone number of principal(s) who will be "in charge" of this firm's work on this project.
- 6 Indicate number of "In-House" technical personnel by discipline and skill level in consultant's or other office.
- 7 Describe Functions or Services to be provided by this consultant or other office.
- 8 Provide names of firm's personnel who have attended a BCOM "CPSM Seminar" on the requirements of the Commonwealth of Virginia Construction and Professional Services Manual and their latest year of attendance.
- 9 Indicate on how many projects this consultant has provided services to the prime.
- 10 Show the consultant's Professional Liability Limits of Insurance with deductible.

General: Provide consultant's typed name, title, signature and date.

## **Form AE-3 PROJECT STAFFING ORGANIZATION**

General:

Insert RFP # being responded to  
Insert name of Entity responding  
Insert name of Project and PC #

- 1 List Project Manager and primary responsible charge designer for each discipline or specialty. Complete a separate Form AE-4 for each person listed.
- 2 Will the persons listed be available to design this project? Do you have sufficient staff to commit to design this project on schedule considering the other work you and your consultants have? Explain.
- 3 How do you propose to assign responsibilities and coordinate the various disciplines involved?
- 4 Explain how you propose to assure that the documents clearly and fully describe the work to be done and how the work shown by various disciplines will be coordinated.

General: Provide respondent's typed name, title, signature and date.

### **Form AE-4 PERSONNEL QUALIFICATIONS**

Use Separate AE-4 for EACH KEY PERSON for this project)

General:

Insert RFP # to which response is being made.

Insert name of Responding Firm.

Insert name of Project and Project Code (PC #).

- 1 Name, Title, and usual job assignment of key person for this project.
- 2 This person's job assignment for THIS project.
- 3 This person's employer.
- 4 This person's total years of applicable experience and years of experience with current employer.
- 5 List College/University attended, Degree earned, year completed, and curriculum or area of specialization.
- 6 Provide information on initial professional registration. Provide Virginia 6 digit registration/license number as it appears on the APELSA certificate.
- 7 Tell what experience or qualifications this person has which makes her or him especially valuable for this particular project.

General: Provide respondent's typed name, title, signature and date.

### **Form AE-5 REPRESENTATIVE PROJECT DATA**

General:

Insert RFP# to which response is being made.

Insert name of Responding Firm.

Insert name of Project and Project Code (PC #).

Using copies of form AE-5, provide information on no more than 5 representative projects which best demonstrate the proposed team's experience and qualifications for this type of project. List projects which have features, functions, types of construction, systems, type of use, or type of occupancy similar to those envisioned for this project.

- 1 Provide representative project name, type of facility (e.g., dorm, hospital, etc.) and the project location.
- 2 Provide information concerning the Owner or Agency for possible reference check.
- 3 Provide information concerning the Contractor who built the project.
- 4 For each discipline shown, list the names of the firms which were responsible for the design in that discipline. Also list the key personnel, still with the firm, for each discipline. Include the most significant special consultant, if any.
- 5 List the applicable codes which applied to this project.
- 6 Briefly describe the project and its features. What is special about this project that would be of interest to the Building Committee for the proposed project?
- 7 Provide requested construction data.
- 8 Describe any Micro and Small Business participation. Include name of firm(s), their project function, and percent of fee.

### **Form AE-6 SUPPLEMENTAL INFORMATION**

General:

Insert RFP# to which response is being made.

Insert name of Responding Firm.

Insert name of Project and Project Code (PC #).

Provide additional Relevant information in brief outline or bullet format.

**Why should your firm be selected for an interview?**

**What expertise can you or your consultants bring to this project to assure optimum functional space utilization design and its timely and cost effective completion?**

Photographs of past projects or other elaborate material are not required unless specifically requested in the RFP.

Firms selected for interviews may, at that time, present supplemental data to further clarify their qualification,

skills, abilities, performance record and approach to providing the services.